



# The Office of Human Resources Offboarding Checklist

Please use the offboarding checklist below to facilitate a smooth and thorough transition, ensuring all essential steps are completed for both the employee and the supervisor.

## Supervisor Responsibilities

### Before Employee Departure

- Obtain Written Resignation**  
Upload written resignation from employee into PeopleAdmin.
- Submit Separation Notice**  
Complete the [Separation Action](#) in PeopleAdmin to initiate the process. Make sure to enter the employee's current mailing address and personal email address to ensure delivery of pertinent information such as W-2 or other tax forms.
- Provide the employee with the checklist on page 2**
- Exit Interview**  
Conduct an [exit interview](#) to understand the employee's reasons for leaving and gather feedback for improvement.
- Transfer Knowledge and Documentation**  
Ensure the departing employee shares relevant documents, workflows, and project statuses with their team.
- Ensure Time Entry**  
Ask the employee to enter their final timesheet and leave entries. (Failure to submit a final timesheet will result in the supervisor having to request a manual check and will delay payment to the employee.)
- Collect University Property**  
Collect all University equipment, such as laptops, phones, keys, badges, uniforms, P-Card, etc.
- Update Email Auto-Reply**  
Assist the employee with setting up an out-of-office email reply to direct emails to the appropriate person.
- Update Phone Voicemail**  
Assist the employee with changing the voicemail message to direct callers to the appropriate person.
- Return of Personal Belongings**  
Ensure that the employee removes all personal items from their office or workspace.
- Exit Survey**  
Provide an anonymous exit survey to collect feedback on the employee's experience with the University.

**Exit Performance Review**

Initiate an off-cycle review for the exiting or transfer employee in the performance management system to document overall performance rating at the time of departure.

### After Employee Departure

**Revoke Access to Systems and Accounts**

Remove [Banner Access](#). Disable access to internal systems, cloud accounts, databases, and software tools. \*Email access will be disabled via the Separation Notice. (Contact Employee Relations if access needs to be disabled immediately.)

**Update Authorization Lists**

Remove the employee's name from authorized signature or access lists, if applicable.

**Update Organizational Charts**

Revise org. charts to reflect the employee's departure and adjust reporting structures.

**Notify Team and Stakeholders**

Inform the team key stakeholders of the employee's departure, including any changes in responsibilities.

**Reassign Tasks**

Reassign ongoing tasks, projects, and deadlines to other team members.

**Plan for Replacement**

Update to the position description to best meet current and future business needs.

## Employee Responsibilities

Submit resignation letter to supervisor

Contact [HR Benefits](#) to review changes to your benefits, including termination of any benefits.

Communicate your current mailing address to your supervisor to ensure timely receipt of W-2 or other relevant information.

Communicate your current email address to your supervisor to ensure timely receipt of pertinent information or communication.

Submit your final timesheet. (Failure to submit a final timesheet will result in the supervisor having to request a manual check and will delay payment.)

Discuss the status of your work assignments and other information with your supervisor.

Return University property such as laptops, phones, keys, badges, uniforms, P-Card, etc.

Remove all personal items from your office or workspace.

Update email auto-reply to direct emails to the appropriate person.

Update phone voicemail to direct callers to the appropriate person.

Complete the [Employee Exit Survey](#).